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# ANALYSIS OF BUSINESS SERVICES SECTOR IN POLAND. CURRENT STATE AND DEVELOPMENT PERSPECTIVES FOR THE FUTURE

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**Purpose:** An in-depth analysis of Poland's modern business services sector in the context of the dynamic implementation and use of artificial intelligence tools and methods to automate and standardize business processes.
**Design/methodology/approach**: A review of relevant literature, industry-specific reports and survey on the use of AI/GenAI tools in the sector.
**Findings**: The analysis conducted in this study highlights the significant role the modern business services sector plays in the Polish economy—not only in terms of its contribution to national GDP but also in shaping the labor market. It is evident that the sector is undergoing a profound transformation. This shift is driven primarily by two key factors. First, the increasing maturity of Shared Service Center (SSC) organizations over the past decades has enabled them to transition from handling basic administrative tasks to managing more complex, knowledge-intensive processes. Second, the emergence of advanced technologies—particularly artificial intelligence (AI) and generative AI (GenAI)—has had a substantial impact on the sector, facilitating this evolution.
**Research limitations/implications**: The analysis of sector-related reports offers a broader perspective on the Shared Services landscape in Poland. The findings of this study can serve as a foundation for further, more detailed research.
**Practical implications:** The article makes a valuable contribution to understanding the current landscape of the Shared Services sector in Poland, highlighting future opportunities and the challenges associated with the implementation of AI/GenAI tools for business process automation. It outlines both the benefits and potential risks of adopting these technologies, while also addressing the growing competitive pressure from other countries—both within the region and globally—where labor and operational costs may be more favorable.
**Originality/value:** This article sheds light on the modern business services sector in Poland as it navigates the growing influence of Artificial Intelligence (AI) tools and methodologies. The study identifies the most commonly used tools for business process innovation and analyzes how industry leaders perceive the rising role of automation—whether as a risk, a challenge, or an opportunity.
**Keywords:** Business Process Management, AI/GenAI, process innovation, outsourcing, Shared Service Sector.
**Category of the paper:** Viewpoint, research paper.

## 1. Introduction

The market for modern business services (both SSC and BPO) appeals to a wide range of interest due to numerous advantages such as increased flexibility, lower costs, and higher quality of services provided. Companies around the world, in search of the most efficient business models, are increasingly opting to use external resources. The concepts of outsourcing, and subsequently offshoring, have contributed to cost reductions and increased operational efficiency. Entrusting the execution of non-core business processes allows companies to focus on their core activities and deliver additional value to customers. The modern business services sector is an important part of the Polish economy. It employs over 457,000 people, which accounts for approximately 7% of total employment in the enterprise sector in Poland. Its share in the national GDP has increased to 5.3%. The sector consists of a total of 1941 centers, characterized by a high level of internationalization and a global scope and scale of operations (Sektor…, 2024).

Currently, the sector is undergoing an intense transformation, entering a more mature phase of development. This involves a shift in focus from quantitative analyses (e.g., employment figures) to qualitative aspects such as productivity (value generated per employee), level of advancement (knowledge intensity in processes, so-called knowledge-intensive processes), automation, and innovation potential (capacity to create intellectual property). The type and scope of activities conducted by these organizations present an opportunity for many Polish regions to enter the sphere of innovation and modern technologies, making them attractive locations for new investments and promoting further economic development.

The purpose of this article is to characterize the modern business services market in Poland and assess its development prospects in the coming years in the context of the intensive implementation of process automation using AI/GenAI tools in these organizations. The article presents the current state of the industry and its development directions. It also highlights the importance of process management for the emergence and evolution of the shared services market, as well as its transformation — from the handling of transactional processes to the execution of innovative and knowledge-intensive tasks. A process is considered knowledge-intensive if achieving the required employee efficiency requires at least six months of training (Sektor…, 2024).

The article applies an analysis of the subject literature, industry reports, and research results related to the modern business services market. Part of the material is based on the author's own research, which will serve as the foundation for her future dissertation.

## 2. Development of the modern business services sector in Poland and globally in the context of BPM process management

The emergence of the concept of modern business services organizations, both in the form of Shared Services Centers (SSC) and Business Process Outsourcing (BPO), would not have been possible without the development of Business Process Management (BPM) methodology. Business process management is an approach focused on operations carried out within an organization in the context of so-called business processes—structured and measurable sets of activities designed to deliver specific value to the customer or market (Davenport, Short, 1990). BPM provides methods, tools, and techniques that enable the identification, analysis, execution, monitoring, and modification of business processes, leading to their continuous improvement throughout the process life cycle. Unlike traditional management, which focuses primarily on organizational structure, BPM places the customer of the processes and the relationships between individual activities at the center of its approach. The goal of this approach is to increase customer satisfaction and improve cross-functional collaboration in the organization (Dumas et al., 2013).

The concept of process management began to gain importance alongside the development of modern information and communication technologies. Their impact on the evolution of business processes is long-term, cumulative, and interconnected, and its progression can be divided into stages: from early and advanced automation, through cross-functional integration, to systemic optimization (Zaorska, 2008). In recent years, the intensive use of ICT technologies by enterprises, including those from traditional sectors not directly related to IT, has contributed to radical changes in their operations. These changes have included, among others, the modernization and improvement of the efficiency of process execution and entire value chains. Moreover, technological development fosters the intensification of globalization, which fundamentally alters the conditions of competition. A company's competitive position today is determined not so much by the possession of resources, but by the ability to control and use them effectively—regardless of whether they are owned by the company or not (Gottfredson, et al., 2005).

To remain competitive in the long term, companies must above all be innovative. This means the need to transform their operations by implementing new management models, introducing innovative products and services, expanding into new markets, leveraging modern technologies, and acquiring new sources of intellectual capital (Vashistha, 2006). The dynamic development of the Internet in the early 2000s significantly reduced the cost of information exchange, which enabled global companies to relocate business processes not directly related to production to countries with lower labor costs. The concepts of outsourcing, and later offshoring, contributed to cost reduction and increased efficiency in areas that—prior to the era of broadband Internet—had been beyond the reach of such activities (Zaorska, 2008). For many

companies, outsourcing has become not only a business model that enables faster expansion into new markets without the need to build competencies from scratch, but also a way to ensure the long-term innovation of their products and services (Bielewicz, Meronk, 2009). Its main advantages include the ability to significantly reduce operational costs, minimize the risks associated with technological and market changes, and streamline key processes—all of which directly contribute to increased competitiveness of the company (Zaorska, 2008). The importance of outsourcing in the operations of modern companies has taken on a new dimension, mainly due to the ability to apply it to an increasing number of non-production functions and processes—which was not possible before the development of modern information and communication technologies.

The concept of outsourcing presented in this article is often identified in the literature with offshoring, which does not reflect reality. The fundamental difference between these two terms lies in the location where tasks separated from the mother-organization' structure are carried out. Outsourcing refers to the transfer of specific tasks and processes from a company's internal structure to an external service provider operating in the same country as the client. In contrast, offshoring is the process of relocating services to another country. In this model, the separated tasks may be performed either by the company itself (internal offshoring) or by a foreign partner (external offshoring). This distinction makes it possible to identify two basic types of offshoring:

- Captive offshoring is a process in which a company establishes a foreign branch or a capital-linked subsidiary. This gives the company full control over the outsourced service processes. Within the structure of the modern business services sector in Poland, these organizations are referred to as Shared Service Centers (SSC).
- Offshore outsourcing is the process of transferring processes and tasks separated from the organizational structure to an external company with no capital ties and conducting business in another country. In the structure of the modern business services sector in Poland, these organizations are called Business Process Outsourcing (BPO) (Marcinkowska, 2015).

## 3. New technologies and their impact on the SSC (Shared Service Centers) sector in Poland

In order to answer the question of what technologies are used by SSC organizations, the author conducted an empirical study among 57 respondents employed in Shared Service Centers. The survey participants represented a diverse range of seniority and held different positions in their companies. Almost half of the respondents (49%) work in organizations employing between 200 and 400 people. The largest group of respondents, 61%, declared more

than five years of seniority in an organization. An analysis of the hierarchical structure showed that 32% of participants held operational positions, carrying out tasks directly in processes. Another 25% were lower-level managers, supervising the work of subordinate specialists. The most numerous group (43%) were representatives of senior management - including, among others, process managers and directors, managing directors of Shared Services Centers in Poland, as well as managers responsible for individual areas of SSC operations, such as finance.

The study was conducted using the CAWI (Computer-Assisted Web Interview) web survey method. The range of questions addressed to respondents included issues concerning the types of technologies used to implement process innovations in modern business services organizations operating in Poland. Among the most frequently indicated technologies were Robotic Process Automation (RPA) and Application Programming Interface (API). APIs enable the integration of systems and automatic data processing, making them among the technologies supporting automation.

Figure 1 shows the percentage distribution of the technologies used and their degree of polarization. Based on the data collected, there are three key artificial intelligence (AI) technologies that are currently being used to automate processes and thus operational tasks in shared service centers. The remaining 20 per cent of indications related to other technologies, including tools used for Business Process Management (BPM) analysis and management.

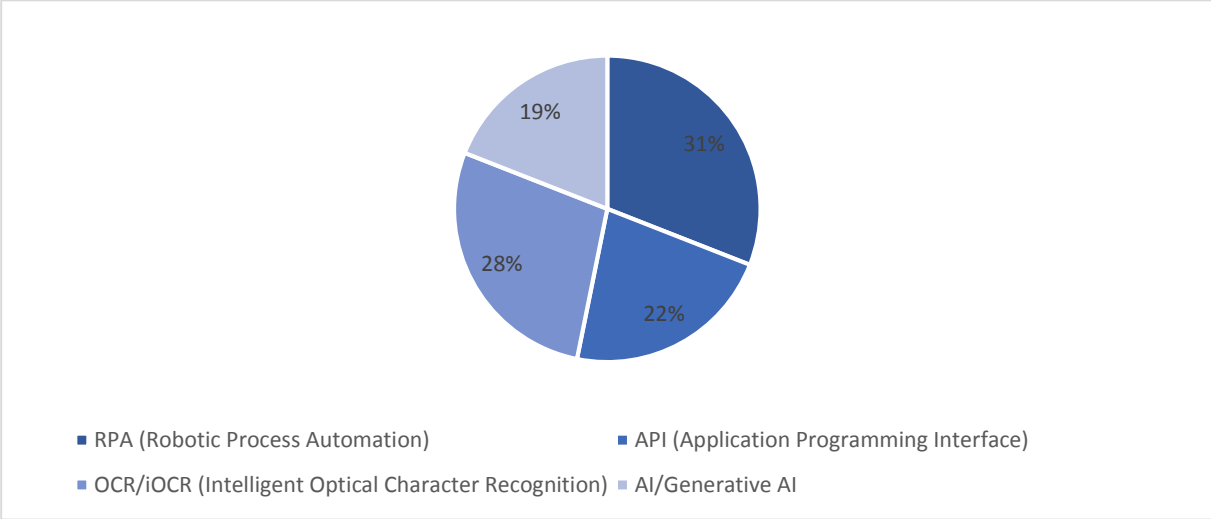


**Figure 1.** The most popular IAP (intelligent process automation) technologies used in business services organizations in Poland in 2024.

Source: own study.

The results of the research conducted by the author are consistent with the data presented by the Association of Business Service Leaders (ABSL), an organization representing the modern business services sector in Poland. As many as 87.5% of respondents indicated the use of RPA (Robotic Process Automation) technology, 65.6% use API (Application Programming Interface), and the third most used technology is OCR (Optical Character Recognition). Among

the less popular but important technologies categorized as Artificial Intelligence (AI), respondents indicated Process/Task Mining tools and Business Process Management Systems (BPMS) or Image Recognition Technologies (Computer Vision) and Voicebots, among others (Sektor…, 2024). According to ABSL's 2024 report, at the end of Q1 2024. 65.2% of organizations in the sector say they use intelligent process automation (IPA) in the execution of daily operational tasks, and 24.1% plan to implement it in the near future. The main reason for this high interest in process automation is to optimize costs, improve the quality and speed of services provided. Figure 2 shows the main objectives of implementing intelligent process automation (IPA) in organizations in the modern business services sector in Poland. The unprecedented driver for IPA implementation is cost optimization - indicated as a key objective for business model transformation by 60% of the surveyed organizations.

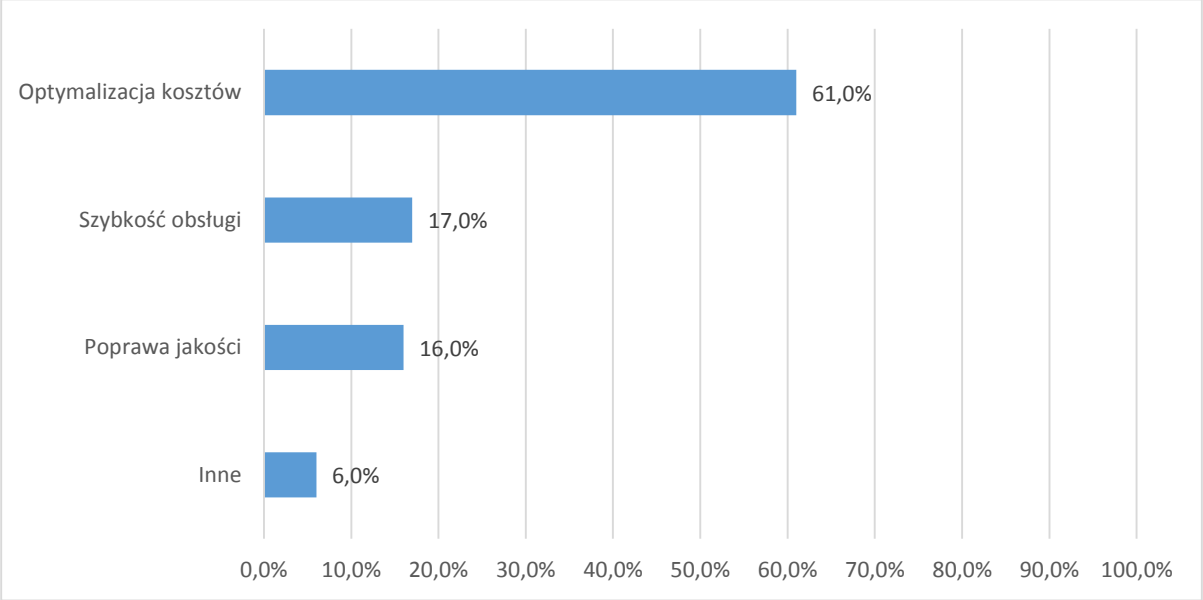


**Figure 2.** Objectives of IPA (intelligent process automation) implementation in the surveyed centers in Poland.

Source: Sektor Nowoczesnych Usług Biznesowych w Polsce (2024).

## 4. Challenges the sector may face in the near future.

According to McKinsey's Global Future of Work report, by 2030 process automation in Shared Service Centre organizations could contribute to a 30% reduction in routine jobs worldwide (Future of Work, 2025). Taking into account that the Polish modern business services sector is heavily involved in Robotic Process Automation (RPA) and Intelligent Processes Automation (IPA), the ABSL's forecast of an increase in employment may prove to be too optimistic. At the same time, representatives of the sector do not see an immediate threat in the form of job cuts. Admittedly, the sector has reported employment growth of 3.8% in

2023/2024 and is planning for further job growth in 2025, albeit at a lower level than in the previous year. The share of AI and GenAI technologies is already at a high level of sophistication, indicating a faster rate of adoption and deployment than expected in previous years. This situation forecasts a significant transformation and change in the nature of the activities of many organizations operating in the area of modern business services. This change will primarily involve a shift from outdated business models focused solely on achieving simple cost efficiencies to dynamic processes based on the use of artificial intelligence. The new approach will not only increase efficiency, but also enable processes of higher complexity. The impact of AI and GenAI is not just reduced to the role of yet another automation enabler. It has a much broader transformational context. There is no doubt that AI is contributing to changes in employment demand patterns, but more importantly, it will shape new skill set expectations for the sector's future workforce.

According to ABSL's 2024 report, 74.4% of surveyed organizations in the modern business services sector in Poland planned to implement a transformation strategy in the first quarter of 2025. The three most frequently indicated elements of this strategy are: automation, process standardization and the use of artificial intelligence (AI). Figure 3 shows all the tools and activities that companies plan to implement as part of the implementation of this transformation strategy.

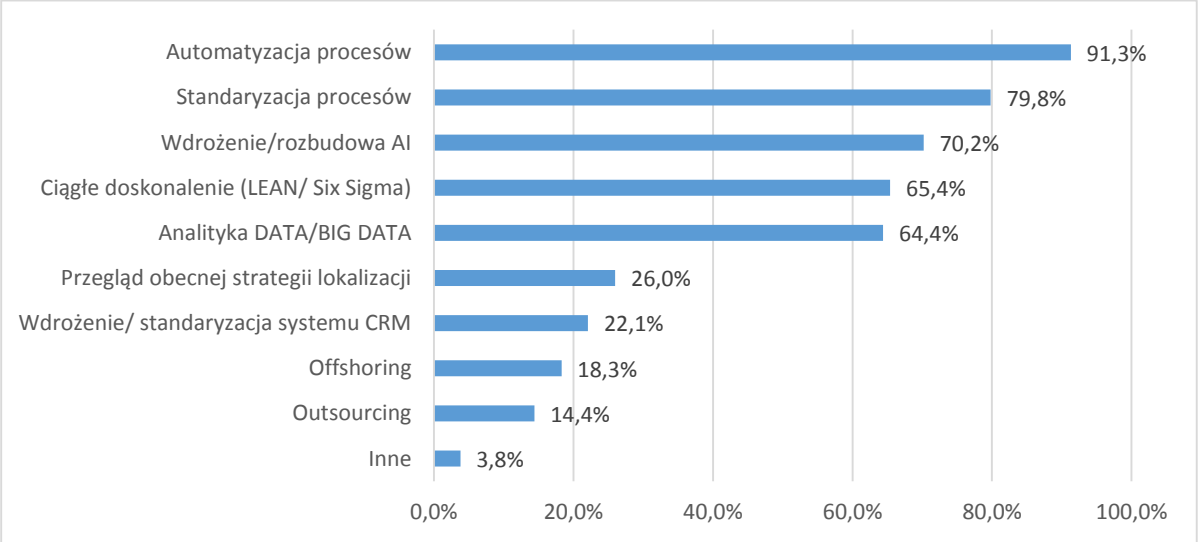


**Figure 3.** Key elements of the business process transformation strategy planned for 2025 in business services organizations in Poland.

Source: Sektor Nowoczesnych Usług Biznesowych w Polsce (2024).

It is worth to mention that one in five respondents points to location re-analysis as an important element of their business transformation strategy, and around one in six is considering offshoring or outsourcing. This indicates a new and growing threat to the Polish modern business services sector – in addition to the dynamic development of technology, there is a risk of relocation to countries offering lower operating costs, primarily in terms of wages and business operations. India is considered to be the greatest threat in the context of relocation

of services from Poland, indicated by as many as 24% of the surveyed companies. Among European locations competing with Poland, Romania, Spain, Portugal, Bulgaria and the Czech Republic are most frequently mentioned.

The ABSL association emphasizes that maintaining the global competitiveness of the Polish modern business services sector requires its transformation – from the implementation of simple, transactional processes to the provision of higher value-added services. It is crucial to implement more advanced functions and roles within business processes, as well as to invest in the development of employees' competencies, especially in the areas of expertise and expert skills.

Another factor pointing a threat to the relocation of services from Poland to other countries is the shortage of talent, i.e. qualified specialists for digital transformation roles. A similar problem is identified by Randstad in its Talent Trends report on the labor market in Poland in 2024. The report shows that the difficulty of recruiting employees with the right competencies and the growing shortage of key qualifications has reached record levels in Poland compared to other countries surveyed (Talent trends, 2024). The answer to this problem is to "pixelise the job" by redefining the current jobs and breaking them down into smaller parts – pixels – made up of tasks and skills. These chunks are then analyzed with the competences and tasks needed to achieve the organization's strategy and goals. The second element that has visibly gained in importance is the change in the attitude of companies towards different, more flexible forms of cooperation and employment of employees (from the traditional full-time position to the employment of temporary or contract workers). The percentage of companies that say they are interested in such forms of collaboration has increased from 40% in 2016 to 65% in 2024.

## 5. Summary

The modern business services sector is an important industry with a significant contribution to the development of the Polish economy in areas such as employment, contribution to national GDP, development of urban centers to increasing innovation in the Polish economy. Despite many unfavorable phenomena in the economic and political space, starting with the COVID-19 pandemic, disruption of global supply chains or the armed conflict in Ukraine, the industry shows a stable position and even forecasts further growth. The rapid development of modern technologies including, above all, artificial intelligence AI/GenAI is seen by the industry as an opportunity rather than a threat. New technologies are transforming the nature of the activities of modern business services organizations from being typically transactional to carrying out knowledge-intensive and more innovative tasks and processes that generate intellectual value. In this context, the challenge will be to find employees with the competencies of the future who can work with and handle new technologies.

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